Operations Leader Assessment

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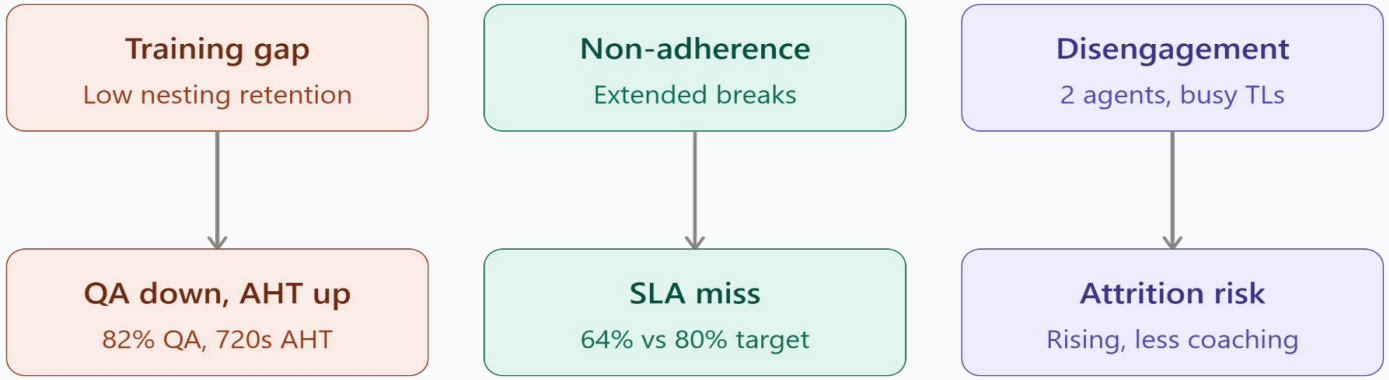
Operational Diagnosis

Root Cause Analysis

Compounding Effects: Every single KPI miss traces back to three unified root causes rather than six separate problems.

The CSAT Convergence: Quality (QA-down) and SLA-down converge on CSAT (78% vs 85%), as customers experience both poor resolutions and long wait times.

The True Bottleneck: The behavioral disengagement thread cuts directly into Team Leader coaching bandwidth, which is the only resource that can fix the other two problems.



Data to Validate First

1. Capacity & Adherence

Interval-Level Adherence: Audit intraday logs to discover if break-overrun behavior is systemic or concentrated in specific outlier agents (including the disengaged tenured agents).

Staffing Math: Compare planned vs. actual staffed hours against required demand to calculate how much of the SLA miss is due to raw coverage gaps vs. agent process errors.

2. Quality & Skill Mapping

QA Defects by Cohort: Map error concentrations to verify if they cluster heavily in the recent nesting wave or if they spread across the entire tenure.

AHT Split (Talk/Hold/ACW): Disaggregate average handling time to pinpoint if the operational inflation is driven by live probing issues or slow post-call documentation.

First 48-Hour Containment

Isolate Toxicity

Conduct same-day 1:1s with the two disengaged agents (looping in HR/TL). Implement temporary schedule or seating changes to prevent negative peer influence.

Tighten Adherence

Partner with WFM to establish real-time adherence triggers, flagging break overruns as they happen rather than waiting for day-end reports.

Triage Floor Noise

Implement an escalate-vs-handle filter for TLs to immediately relieve overload. Hold quick-hit huddles on the top 3 QA errors and keep floor communications clear.

Requests to Support Areas

Department	Specific Action & Deliverables Requested	Targeted Impact Metric
WFM	Interval adherence report by agent; root causes of break overruns; staffing-vs-demand analysis; options to stagger lunch and break timings.	Adherence, Capacity & SLA
QA	Error breakdown by tenure; structured calibration session; one-page top-3 error coaching guide for immediate TL floor execution.	QA Score, CSAT & AHT
Training	Nesting playbook and retention review to isolate training delivery failure paths; rapid refresher modules delivered to the affected cohort.	Process Knowledge & QA

Supporting Team Leaders

Bandwidth Recovery

Absorb Escalations: Actively triage and absorb non-critical administrative tasks and low-priority issues so TLs are not drowning.

Escalate-vs-Handle: Give TLs a clear, simple decision-making framework to handle routine occurrences on the floor autonomously.

Skill Transfer

Coach the Coaches: Join TLs directly during their 1:1 sessions and QA calibrations, ensuring operational coaching skills transfer without just increasing their workload.

Separate Check-ins: Set up a dedicated TL check-in cadence to hear what is specifically blocking them on a daily basis.

Two-Week Recovery Plan

Days 1–4

Deploy immediate containment; validate support data; begin targeted QA floor coaching; address toxic behavior.

Day 5

Checkpoint 1: Assess direction of adherence and AHT. Send initial recovery progress update to client.

Days 6–10

Execute nesting refresher; conduct QA calibration sessions; continue coaching; perform daily calibration audits.

Day 14

Checkpoint 2: Final KPI review. Deliver data-backed update and proof of recovery trend directly to client.

Daily KPIs and Rationale

- **Adherence:** Checked hourly. This is our fastest-moving discipline signal on the floor to verify active compliance.
- **AHT with Talk/Hold/ACW Split:** Tracks call progression and tests if TL coaching is actively landing.
- **SLA:** Checked daily. This is the client's core headline metric for service levels.
- **QA via Sample-Based Calibration:** Sampled daily to catch operational drift before the monthly scores drop.
- **Attendance:** Leading indicator for both raw adherence levels and overall program attrition.
- **CSAT Strategy:** Better tracked on a weekly basis due to customer survey lag; we will watch daily verbatims for spikes instead.

Part 2: KPI Prioritization

Targeting specific agent-level patterns with appropriate tactical levers.

Agent Prioritization Matrix

- **Compliance Outliers:** Agent 2 (high attendance/adherence gaps) bypasses typical coaching and goes straight to a formal corrective action pathway.
- **High-Impact Skill Gaps:** Agent 3 (worst quality & handle times despite great attendance) receives immediate intensive coaching and call calibrations.
- **Superstar Lever:** Agent 5 (perfect across all metrics) is leveraged as a peer mentor to demonstrate best practices to nearby agents.

Agent	Pattern	Priority	Lever
1	Near-target across the board	Low	Light coaching on QA/AHT
2	Attendance −12 / adherence −16, but QA & CSAT above target	High (behavioral)	Direct conversation → corrective track
3	QA 74 / CSAT 70 / AHT 780 — worst in group — despite solid attendance	Immediate	Intensive coaching, call calibration
4	Every KPI below target, worst AHT (810)	Immediate	Root-cause conversation, then corrective track
5	Every KPI above target	—	Peer mentor
6	Adherence/QA/AHT all at risk, less severe than #4	High	Coaching + close monitoring

KPI	Target	Current
Attendance	94%	88%
Schedule Adherence	92%	84%
QA Score	90%	82%
CSAT	85%	78%
AHT	580 sec	720 sec
SLA	80% in 60 sec	64%
Attrition Risk	Low	Increasing

Follow-Up & Upward Reporting

Daily Follow-Up Cadence

Structured Checks: Run 5–to-10 minute quick check-ins with Agents 2, 3, and 4 every morning.

Focused Audits: Real-time adherence checks for Agent 2; one QA-tagged call review per day for Agents 3 and 4 tied directly to that day's top defect theme.

Smart Control: Utilize an exception-based adherence dashboard rather than manually auditing all 32 agents daily.

Upward Reporting Protocol

Core Indicators: Track daily and weekly trend movements on the six core program KPIs against targets.

Progress & Risks: Share what interventions are in-flight, early progress signals, root-cause validation status, and disengagement or attrition risk flags.

Operational Cleanliness: Individual-level performance details stay strictly at the TL/HR level unless requested.

Part 3: Client Update Script

"Performance has been declining for three weeks, and we have isolated three root causes. We have immediately deployed containment: same-day disengaged agent realignment, real-time WFM adherence sweeps, and QA side-by-sides on documentation, probing, and ownership. I will provide a daily operational flash and deliver a structured 2-week recovery plan with daily metric milestones within 48 hours."